DOCUMENT RESUME

ED 467 906 CE 083 748

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TITLE Adult Learning as Strategic Behaviour and Strategic Learning as Competence.

PUB DATE 1999-02-00

NOTE 49p.; In: P. Alheit, J. Beck, E. Kammler, R. Taylor, and H. S. Olesen, Eds. Lifelong Learning Inside and Outside Schools: Collected Papers of the European Conference on Lifelong Learning (2nd, Bremen, Germany, February 25-27, 1999). Roskilde, Roskilde University, 2000. v2, p444-473.

AVAILABLE FROM For full text: http://www.erill.uni-bremen.de/lios/sections/s4_damme.html.

PUB TYPE Information Analyses (070) -- Speeches/Meeting Papers (150)

EDRS PRICE EDRS Price MF01/PC02 Plus Postage.

DESCRIPTORS *Adult Learning; Adult Students; *Competence; Continuing Education; Definitions; Educational Research; *Enrollment Influences; Family Influence; Human Capital; *Learning Motivation; *Learning Processes; Learning Theories; Literature Reviews; Models; Participant Characteristics; Participation; Social Capital; Social Influences; Social Structure; Strategic Planning; Student Characteristics; Transformative Learning

IDENTIFIERS Bourdieu (Pierre); *Strategic Behavior

ABSTRACT

A conceptual framework for analyzing participation in adult education was developed. Adult education participation was considered a specific kind of strategic behavior. The term "strategic" was defined by proceeding from Pierre Bourdieu's concept of "educational strategy," which permits consideration of the structural constraints that the social order imposes on social actors and the active practices with which actors react against those constraints. Educational strategies were characterized as follows: (1) they steer the decision-making processes in education and learning by generating pragmatic-rational answers to challenges; (2) they can be discerned in an "education as investment" approach, where educational participation is perceived as an investment in economic, "human" capital as well as in social and cultural capital; (3) the subjects and practitioners of educational strategies are individuals in households but operate in a given frame of social relations and rules; and (4) they must be understood in terms of the life histories of learners and their families, and they are situated within specific societal conditions and transformation processes. Strategic learning was deemed a key competence in late modern society, and control and identity were considered key elements of this competence. Strategic learning competence was said to include the ability to generate accurate and adequate planning skills. (Contains 68 references.) (MN)

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Adult learning as strategic behaviour and strategic learning as competence

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Introduction

Why do adults choose to learn by participating in more or less formal educational or training activities, or why don't they? This is an important topic in the field of adult education research. One could even say that participation is the dominant research theme in adult and continuing education, which almost paradigmatically controls the field. Captivated by the problematic notion that adults choose freely to participate in various kinds of formal or non-formal learning activities, this vast area of research has focussed heavily on 'motivation for' and 'barriers against' participation (Stalker, 1993; Leicester, 1994).

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These topics certainly are relevant in a policy-oriented research tradition, where the promotion of adult education in the making of a lifelong learning society is often high on the agenda. In that context, participation is the desirable outcome of policies, and the lack of motivation and the different kinds of barriers that hinder potential participants engaging in learning activities for which they have developed a manifest demand, are the obvious explanations for low or less than optimum participation rates. There is an underlying assumption in this reasoning that all adults have a 'natural' inclination to learning, and therefore to participation in formal and non-formal learning settings. Participation, driven by a naturally high demand from motivated learners, is not only desirable, it is almost a given.

Empirical research on adult education participation over recent decades has heavily supported this psychological and often optimistic approach (see the useful syntheses of Cookson, 1986; Rubenson, 1987; McGivney, 1993; Courtney, 1991; Merriam & Caffarella, 1991). From Houle's seminal The Inquiring Mind (1961) onwards, emphasis has been placed on adults' motivation for learning. Well-known typologies have been developed about learners. Relatively sophisticated models such as the congruency model of Boshier (1973), the expectancy-valence model of Rubenson, the chain-of-response model of Cross (1981) have tried to catch the complexity and dynamics of participation (Merriam &

Caffarella, 1991; Yang, 1998). However, most models stay within what could be called a 'motivation paradigm', where attitudes, personality traits, intellectual capacities, expectations and contextual variables constitute the framework.

In my view, the psychological and individualistic concept of motivation, closely linked to the notion of voluntary participation, cannot capture the broad scope of economic, social and cultural factors in the actual process of decision-making in adult education participation. The standard lists of motives and barriers used in mainstream adult education participation research, such as those in the Education Participation Scale of Boshier, cover not much more than factual deliberations at the 'surface' of the decision-making process. In fact, these psychological categories in themselves do not inform us of the reasons for (non)participation or about the far more complex process of decision-making. They have their place only in the final phase of a far more comprehensive process of decision-making.

Besides this psychologically-oriented research paradigm, there is a growing body of literature on the sociology of adult and continuing education. Sociological approaches to participation have stressed the stratified nature of participation. The sociological profiles of participants compared with those of non-participants reveal the highly uneven distribution of educational opportunities. It

appears that the inequality of adult education participation even reinforces the unequal trajectories of initial education and the already unbalanced distribution of opportunities. In his review of the research field, Rubenson adds: "the better an education pays off in terms of income, status, occupation, political efficacy, cultural competence, and similar matters, the greater the differences in socio-economic status between participants and non-participants" (Rubenson, 1989).

From this it is but a small step to a reproduction theory of adult education, in which the differential distribution of adult education participation is seen as evidence in favour of the thesis that adult education reproduces the social system rather than transforming it. Jarvis (1985) has articulated this view explicitly by distinguishing six social functions of adult education, of which "maintenance of the social system and reproduction of existing social relations" is the first. In his view, the uneven distribution of adult education participation can be understood as contributing to the reproduction of social inequality and the division of labour in society. More radical approaches to adult education extend this idea to a functionalist concept in which not merely the social effects of adult education participation but rather the structural functions of the adult education system serve to reproduce the capitalist social order.

However, it is not clear how individual decision-making in adult education participation actually relates to social reproduction. The

social effects of unequal participation in the end can be such that social and power relations are more or less reproduced, but that does not explain very much of the logic behind individual decisions that produce unequal participation. For example, according to the interesting research of Gorard et.al. (1998) the 'learning trajectories' of adults pattern and predict participation behaviour in such a way that they reproduce existing inequalities and the corresponding distribution of educational opportunities. People making these decisions appear as victims of a deterministic, unequal allocation of opportunities and have few chances of escaping the trajectories into which they fit statistically. Even when Gorard et. al. correctly label it arrogant to assume that non-participants "are the ones at fault", the non-participants nevertheless appear as "not seeing education or developmental training as appropriate". They seem to be 'blind' to the potential benefits lifelong learning could offer them. This seems to be a rather poor rationalization of the decision-making of non-participants. Even when they are seen as 'victims' of the processes and factors that determine their educational opportunities and the chances to follow certain trajectories, one must develop an analytical perspective that offers the possibility of seeing the strategic rationality behind decisions actually taken.

In the psychological and sociological approaches to adult education participation – and in the field of career decision-making

where the same observation has been made (Hodkinson & Sparkes, 1997) - there is an almost total absence of recognition of the centrality of the actual decision-making processes. Conceptually, one must choose between individual motivation and the choice to participate, and socially differentiated and structured trajectories functional to social reproduction. However, actual decisions concerning adult education participation in real life do not fit any of those two alternatives easily. We need a conceptual framework that can overcome this dualism – which, in fact, is but a version of the perennial agency-structure dualism in social sciences - and to integrate psychological and sociological factors in a dynamic model of decision-making processes in adult education participation.

In my view there is need for an integrated perspective in which adult education participation can be seen as a result of the complex interplay between socially and culturally patterned opportunities and decision-making processes of 'primary actors' (individuals, households, local communities, social groups, etc.) (Craig, 1981), operating within the context of social structures and power relations. Moreover, this perspective should be 'historical' in the sense that time is an essential ingredient; opportunities and decision-making processes are linked within the context of individual and family life-histories, even across generations.

In this paper we offer such an alternative conceptual model by stressing the strategic nature of adult education participation. This conceptual framework has been developed in the context of a research project on adult education participation in Flanders. In one part of this project 18 adults were interviewed in depth about their educational life-histories and their educational experiences and behaviour after finishing their initial education. We do not report on this research project here, but concentrate on the conceptual model that proved stimulating in analysing our data on educational biographies. In the final part of the paper we discuss the topic of strategic learning as a key competence in late modern 'learning society'.

Adult learning as strategic behaviour

The conceptual framework developed in this paper approaches adult education participation as a specific kind of strategic behaviour. When we speak of 'educational strategies', we designate the underlying drive that guides people in their decisions concerning education and learning. Before we elaborate this further, let me

explain why I consider the concept of strategy to be fruitful for the understanding of educational participation.

The concept of 'strategy'

In the social sciences the concept of 'strategy' has many uses and origins. In order to explore its potential for education and learning we can benefit greatly from the way historians and anthropologists have used it in the context of family history (Viazzo, 1993). Family historians and anthropologists have used the concept predominantly in the areas of marriage, fertility and inheritance. Other disciplines have followed suit. However, in its journey the concept has lost much of its precision. Viazzo speaks of an alarming lack of academic rigour.

In general, the concept of strategy has been attractive because of its capacity to mediate individual 'free choices' on the one hand and societal relations and structures on the other. In an important manifesto in favour of the concept of 'family strategy', Louise Tilly (1979) characterized it as a concept of unique analytical value in examining the links between individual lives and collective behaviour and in reintroducing intentionality and uncertainty into history, without abandoning systematic analysis.

The concept of strategy has been used mostly by anthropologists, historians and social scientists who wanted to escape the pitfalls of structuralism without falling into the shortsightedness of methodological individualism and its related rational choice theories. It has also proven useful for social historians who refused to see social change completely as the result of systemic developments or of 'social control' interventions and regulatory policies of the elites, but who tried to bring the behaviour of ordinary people back into the picture of historical analysis. Attention to strategic behaviour 'from below' can therefore be seen as correcting the dominance that the functionalist 'social control' paradigm has gained in the historical and social sciences. In speaking about lowering tolerance thresholds among late-eighteenth-century families and neighbourhoods, Lis & Soly (1996), for example, locate the strategies of families and local communities towards the unruly and the deviant in a global adaptation process: "The less well-off population groups certainly did not alter their tolerance thresholds because they had been won over to the elites' rules of behaviour, but because they had to adapt their survival strategies to the altered social reality" (Lis & Soly, 1996, 197).

It is precisely in the notion of 'survival strategies' that the concept of strategy has gained popularity among anthropologists, social historians and sociologists. Survival strategies are those

strategies by which lower-class actors (individuals, families, local communities) try to reproduce themselves in worsening socio-economic conditions, to secure their own survival and to hold control over their own present and future situations and destinies. This notion has been used in such diverse fields as demography, family history, welfare sociology, sociology of poverty, feminist theory, criminology, etc., to explain various kinds of behaviour such as reproductive behaviour and fertility, transmission of property, changing gender-role patterns, development of exchange networks, children's employment, labour supply and income-generating decisions, migration, patterns of criminal behaviour, etc. In much research it is clear that these survival strategies must not be limited to socio-economic adaptation in the narrow sense, but be seen as part of a more general compulsion to protect as long as possible one's individual and family's autonomy in responding to stressful circumstances. This general striving for autonomy undoubtedly also extends to fields such as education, and the reproduction and transformation of cultural capital.

An important question in this respect concerns the space within which social actors can develop strategic behaviour. How broad is the range of possible alternatives between which a seemingly 'free choice' is exercisable? One could say that it is precisely here that the interplay between power and 'social control' strategies 'from above'

and survival strategies 'from below' becomes visible. This in itself indicates that the study of strategies is not incompatible with an analysis of structure and power relations. Not only strategies from above, but also socio-economic constraints in general, narrow the space in which individuals, households and local communities can operate strategically. Some critics of the notion of 'survival strategies' have argued that when this space becomes too narrow and when there are almost no alternatives for available actions, the concept of strategy can no longer be usefully applied. Natalie Zemon Davis, for example, maintains that strategies can be pursued only by families that situate themselves above the poverty line, thus questioning the notion of 'survival strategies' itself (quoted in: Viazzo, 1993). One could argue, at least theoretically, that there always are 'second best strategies', however narrow the opportunities are.

It is valid to argue that the concept of strategy is best applicable in a context where power is exercised in a conditional manner. Regardless of its ideological connotations, the notion of 'freedom of choice' can be seen as a feature of specific patterns of social relations that are located in time and space. An open society in which power is mostly limited (or is absolute in only a limited number of situations) gives more space to the oppressed to develop strategic behaviour than a society in which power is normally absolute and unconditional. This recalls the theme of reciprocity in Western

European conceptions of power; according to Barrington Moore (1966) the reciprocity of pacification and protection, characteristic of Western European feudalism, foreshadowed the origins of modern concepts of justice and democracy, necessary components of the modern social state and the Western European 'welfare state'. The 'deferential dialectic' (Newby, 1975), typical of early-modern and modern European power relations, can be interpreted as constituting a social space in which social actors from below could legitimately develop strategic behaviour.

In his important Domination and the Arts of Resistance (1990), the anthropologist James C. Scott has explored the many ways in which the relatively powerless develop strategies to resist domination. They develop overt and also hidden forms of resistance, which prefigure a 'hidden transcript' of power relations. In the complex process of negotiating power relationships, subordinates conquer particular social spaces and sites where power is restricted and various kinds of subcultures offer opportunities to reveal the hidden transcripts. In these 'social spaces of relative autonomy' dispersed elements of the 'infra-politics' of subordinates can be linked together, and under specific circumstances these environments can produce the conditions for open resistance and revolt. This suggestive analysis makes clear that power itself

produces countervailing spaces where autonomy is conquered and defended and where collective strategies are formed.

This dialectical perspective also indicates that the space within which strategies from below can be developed is not only determined by power relations but can also be negotiated by social actors from below. It is a well-known fact in welfare sociology, for example, that families dependent on welfare continuously try to resist or to escape the attempts of welfare institutions and professionals to limit the behavioural alternatives open to them, not because they contest the alternatives open to them in themselves, but because they want to oppose the very power of definition exercised on them. It is here that the notion of 'autonomy', which we introduced above, becomes of crucial importance. In negotiating their 'strategic space', social actors try to defend their autonomy.

In this notion of autonomy, two elements seem important. First, social actors can only see themselves as autonomous and, therefore, are capable of acting strategically, if they can demarcate themselves from the surrounding social environment. In her already-mentioned critique, Zemon Davis argued that this only applies to families in Western European society from the sixteenth century onwards. Moreover, in contemporary sociological analysis it is clear that the notion of self-control and demarcation from the environment applies to individuals, families and local communities only under

specific social conditions. In the last paragraph of this paper we will explore the idea that this notion is also relevant for a concept of strategic learning as biographical competence. Second, the notion of autonomy and the concept of strategic behaviour imply the ability to control time and space environments. Strategic behaviour supposes that social actors are able to foresee and to plan the future. This notion of planning and control of time and space environments implies also the capability to explore the boundaries of strategic space that is negotiable within existing power relations. In this respect a reference could be made to the social-psychological concept of *'locus* of control' and to the idea of planning prevalent in psychological modernization theories.

The idea of planning certainly is crucial to the concept of strategy. Ranging from short-term responses to unexpected events to a more or less coherent set of decisions that anticipate events occurring in a more distant future, strategic actions are only possible when social actors have a fairly accurate view of the logical and chronological order behind events taking place in their life-world, and of the probability that their actions influence these events in a desirable direction. This is what is behind the often degrading phrase - 'calculative behaviour'. The temporal frame within which such calculative planning is situated almost always is that of the life-cycle, but family historians have found examples of strategic behaviour

extending over several generations. More than other social institutions - and therefore it is the privileged *locus* of strategic behaviour - the family is capable not only of coping successfully with short-term life-cycle disruptions, but also of linking these short-term events with long-term planning. The family can integrate individual life-cycles of its members extending over several generations in a more or less coherent strategy. In this sense the idea of planning, as the temporal component of the concept of strategy, can be seen as an attempt to defend autonomy against the logic of the uncertainty of time.

From an epistemological and research point of view, however, the idea of planning is far from unproblematic. It is not the often-posed but essentially trivial question about whether the concept of strategy supposes a conscious approach to the future that is relevant in this respect, but the risk of teleological fallacy. In biographical research and oral history it is a well-known problem that interviewees tend to construct a coherent image of the past by hindsight when speaking in the present. Explaining things when knowing how things actually evolved is a fallacy that threatens biographical research in general. The concept of strategy suffers from the same risk. The danger of teleology - which as we know is not far from that of functionalism - in the concept of strategy is that we explain the regularity over time of effects of actions as the planned outcome of

deliberate decisions. Actual events must be seen as possible outcomes, and one must acknowledge that certain decisions and actions can result in very different outcomes. Only methodologically very careful research can avoid this risk, by bringing as much evidence as possible together in order to reduce uncertainty in deciding whether the outcomes of actions in fact can be seen as the result of strategic planning (Viazzo, 1993; Straw & Kendrick, 1988).

In any event, it seems plausible that the capacity of planning itself is changing with historical evolution. Over the last two centuries modern families have accumulated more and more expertise and operational knowledge in planning and forecasting, and their capacity to develop successful strategic behaviour extends now to various domains of their life-world. This evolution coincides with a general broadening of socio-economic, political and cultural conditions favourable to strategic behaviour. Starting from strategies in labour allocation, income pooling and demographic control, families have developed the capacity of strategic behaviour in many less material fields of action, among which education is certainly important. One could argue that in contemporary society, educational strategies have become the most important.

Pierre Bourdieu on educational strategies

In order to explore this further we must look to Pierre Bourdieu's concept of strategy - especially that of 'educational strategy' - in relation to his field-theory and the concept of *habitus*. Bourdieu, who founded his empirical approach of strategic behaviour in famous studies of marriage strategies of farmers in the region of Béarn (Bourdieu, 1972) and in ethnographic research of Kabylian communities in Algeria, has developed this further in various publications, mainly Le sens pratique (1980), Choses dites (1987) and Raisons pratiques (1994a). In some papers and interviews he has refined his use of the concept of strategy and has defended it against some alternative interpretations (Bourdieu, 1988, 1994b; Bourdieu & Wacquant, 1992).

With the concept of strategy Bourdieu disputes as well the structuralist analysis of 'rules' as the methodological-individualistic basis for decision-making in rational choice theory. Against structuralism, he takes the position that we must return to the analysis of action and practices and leave the abstract analysis of the functioning of rules and systems behind. The concept of strategy allows us to take into account both the structural constraints, which the social order imposes on social actors, and the active practices with which actors react against these constraints. He argues for a paradigmatic break:

"(...) symbolisé par le recours à la notion de stratégie, au principe même de la pratique, au point de vue des acteurs - ce qui ne veut pas dire (...) dans leur conscience, par une regression vers une phénoménologie subjectiviste, servant de fondement à une vision naïvement 'spontanéiste' de l'ordre social." (Bourdieu, 1994b, 4)

In his (too?) frequent and severe attacks on rational choice theory Bourdieu emphasizes that strategies are not necessarily rational in the narrow economic sense. They are not driven by the deliberate profit-maximizing logic of selfish individuals. Rather they are generated by a number of 'self-evident' principles that define the 'rules of the game' in a given 'field'. Strategies are culturally and socially situated and located in a social setting. Obviously, the concept of strategy comes close to the concepts of 'field' and *habitus*. Especially with the latter the distinction is not always clear; but in some phrases he points at their interrelationship:

"Les stratégies de reproduction ont pour principe non une intention consciente et rationelle, mais les dispositions de l'habitus qui tend spontanément à reproduire les conditions de sa propre production." (Ibid, 6)

Elsewhere he defines *habitus* as:

"(...) the strategy-generating principle enabling agents to cope with unforeseen and everchanging situations; (...) a

> system of lasting and transposable dispositions which, integrating past experiences, functions at every moment as a matrix of perceptions, appreciations and actions and makes possible the achievement of infinitely diversified tasks" (Bourdieu & Wacquant, 1992).

The *habitus* of social actors in a given field produces strategies objectively adapted to the situation and needs, although they are not the results of explicit and consciously aspired aims nor of automatically accomplished consequences of external determination. The notion of *sens pratique* instead makes clear that social actors are guided by a relatively durable and fundamental belief:

> "(...) [une] système acquis de préférences, de principes de vision et de division (ce que l'on appellee d'ordinaire un goût), de structures cognitive durables (qui sont pour l'essentiel le product de l'incorporation des structures objectives) et des schèmes d'action qui orientent la perception de la situation et la réponse adaptée. L'habitus est cette sorte de sens pratique de ce qui est à faire dans une situation donnée (...)" (Bourdieu, 1994a, 47).

Strategies are characterized by the internal logic that serves to reproduce the position of social actors in a given field. Bourdieu, therefore, often speaks of 'reproduction strategies', of which he distinguishes several kinds according to the various kinds of capital:

biological investment strategies; inheritance strategies; economic investment strategies; symbolic investment strategies; ... and also educational strategies. The choice of any one strategy depends on the relative importance of the various kinds of capital in the social order and on the state of the reproduction mechanisms, and on the differential profit a social actor can expect from investing his capital. This in turn is a function of the internal structure of his capital and of the power he can exert on the different institutional reproduction mechanisms, such as the labour market, the matrimonial market or the 'educational market' where credentials and 'titles' are traded and rewarded.

Educational strategies are strategies that are based on long-term investment in educational capital. This notion is not the same as the economist's 'human capital', but is essentially cultural. Academic titles do not necessarily represent specific bodies of knowledge and skills, but are seen as valuable because they produce social agents "dignes et capable de recevoir l'héritage du groupe" (Bourdieu, 1994b, 6). Especially in Homo academicus (1984) and La noblesse d'état (1989) Bourdieu has examined this logic of the reproduction of social class by a system of trajectories and classifications that operate more and more via educational titles. In fact he acknowledges a structural tendency by which educational capital becomes more important in the reproduction of social classes:

> "L'histoire des sociétés européennes est très profondément marquée par le développement progressif, au sein du champ du pouvoir, d'un mode de reproduction à composante scolaire, dont on voit d'abord les effets dans le champ du pouvoir lui-même avec le passage de la logique dynastique de la 'maison du roi', fondée sur un mode de reproduction familial, à la logique bureaucratique de la raison d'état, fondée sur un mode de reproduction scolaire" (Bourdieu, 1994b, 10).

The internal logic of educational strategies is the 'reconversion' of cultural capital into educational capital (Bourdieu, 1978). Educational capital now is the 'new capital' (Bourdieu, 1994a, 37f). The transformation of the relationships between social classes ("reclassification") in a power field marked by a bureaucratic logic is seen as responsible for the expansion of the educational system. Groups situated in the field of power, for example, convert their cultural capital into educational capital by means of certain educational strategies in order to reproduce their position in a social order more and more characterized by a bureaucratic logic. The effects of this are profound but also contradictory, since 'over-schooling', educational inflation and devaluation of credentials can be seen as responsible for contemporary social disruption, as experienced in May 1968.

In most cases the social actors practising strategic behaviour are families. Families are socially constructed realities (Bourdieu, 1996), but they are also the sites of social reproduction and therefore the most important *loci* of strategies. In all his empirical and theoretical work, Bourdieu focuses on family strategies. In his view, families and reproduction strategies are intertwined; without families there are no strategies, and without strategies there will be no more families.

This short synthesis of Bourdieu's approach to educational strategies delivers powerful elements to help us further develop our concept of adult education as strategic behaviour. Although Bourdieu has been accused of introducing new kinds of structuralist determinism into the social sciences, his stress on the 'practical' aspects of *habitus* and strategies seems to be very fundamental and opens up various avenues of empirical research into real strategic behaviour. At the same time it is acknowledged that strategic behaviour is located in a given social context which conditions both its internal logic and its constraints. Finally his definition of strategy is a step forward from narrow rational choice theory, even when he implicitly incorporates important elements of this tradition into his reasoning.

Bourdieu's view of educational strategies is very inspiring and empirically convincing. In an historical sense, it links new

reproduction strategies of social classes, aspiring to hold or improve their positions in the power field, with the fundamental transformation of society, the economy and the state. Nevertheless, it seems to be rather narrow in two aspects. First, it is empirically and conceptually restricted to reproduction strategies of old and new upper classes and - to a lesser degree - middle classes. Defining the essence of educational strategies as a reconversion process of capital limits the use of the concept of educational strategies to those classes that already possess economic or cultural capital. His concept of strategy must be rephrased in order to accommodate the strategic behaviour of subordinate social actors. In Bourdieu's analysis, for example, there is no room for the observation that the 'meritocratic' society (in which education, at least ideologically, promises social mobility on the basis of talents) has also produced upward mobility of lower social strata. Following the notion of survival strategies, it is also necessary to define forms and spaces of educational strategies from below. In my view, credentialism has shaped new opportunities by opening up routes of social mobility for those whose only capital is their own abilities. This meritocratic idea is clearly empirically observable in the biographical strategies of (non)participants in adult education. Regarding the lower classes one could define educational strategies as a transformation or 'reconversion' of one kind of human capital to another, that is, as an attempt to convert human capital

based on labour supply into human capital based on education. This seems to make sense given the fact that educational strategies often imply decisions on the trade-off between schooling and work. Decisions to choose education over work for lower-class households mean an investment strategy based on the perceived likelihood that education might result in some future return of higher ranked jobs, wages and living standards. This is observable in historical and in contemporary research (Maynes, 1985, 123). Educational capital thus permits lower-class households either to restrict their labour supply strategy or to improve their standard of living. In the context of the emerging welfare society and the intertwined processes of upward social mobility of lower-class families and educational expansion, the *habitus* became dominant among those strata that contained the 'categorical imperative' to provide their children with a better education than their own, in order to improve living conditions and to promote new social mobility.

Second, Bourdieu's concept of educational strategies gives too much weight to titles and credentials. In my view, educational capital must be seen in a much broader sense by including actual knowledge, skills, attitudes, etc., which define a person's 'educational value' in the market place. Empirical research in the human capital tradition has found that the appreciation of someone's educational capital in the various markets where it can be invested can happen in

a number of ways. Credentials and titles are only one part of the game, although the relative importance of this part varies from one country to another. In France, and in some other continental European countries, the value of credentials on the labour market is relatively important; in more open economies the actual possession of knowledge and skills, even obtained outside formal education, is far more important, to the detriment of diplomas. This broader approach seems relevant for a concrete understanding of the logic behind strategies regarding participation in adult education.

Characteristics of educational strategies

We can now turn to a further exploration of our concept of 'educational strategy' and its application to the analysis of adult education participation. In addition to what has already been argued, educational strategies have a number of characteristics:

(1) they steer decision-making processes in education and learning by generating pragmatic-rational answers to challenges;

(2) as a possible justification for educational strategies, they can be discerned in an 'education-as-investment'-approach, where educational participation is perceived as an investment in economic, 'human capital' as well as in social and cultural capital;

(3) the subjects and 'practitioners' of educational strategies are individuals in households, but operating in a given frame of social relations and rules, a 'field' in the terminology of Bourdieu;
(4) educational strategies are in two senses 'historical' - they must be understood in terms of the life-histories of the persons and families involved, even across generations, and are situated within specific societal conditions and transformation processes.

(ad 1) First of all, the rationality of decision-making processes in the context of educational strategies must be stressed. Bourdieu's critique of rational choice theory must not lead to the misconception that strategies are not rational at all. Adult education participation research has already suggested that participants have a fairly accurate idea of the potentially beneficial outcomes of their participation. In his review of research, Rubenson even suggests that the most powerful impediment to participation is the expectation that it will not result in a desired outcome (Rubenson, 1987; Van der Kamp, 1992, 193). There is good reason, I believe, to assume that there is a great deal of rational calculus behind participation behaviour.

Of course, the term 'rational' itself is subject to much criticism and debate in the social sciences. The rational choice theory of the economics of behaviour postulates a rationally calculating *homo*

economicus, who strives for maximal return. Criticisms of the narrowness and reductionism of this theory have been very severe. In recent approaches, however, the term 'rational' is broadened to include also moral, ideological and normative rationales of behaviour (Elster, 1986, 1989; Hindess, 1988). In this sense, participatory behaviour is not necessarily only 'economic' (aimed at maximalizing economic goods as employment, career perspectives, income, etc.), but its rationality can be situated also in much broader domains. In the 'meanings' people attach to educational strategies, reference can be detected in very different ambitions, concerns or prospects. Some of these are openly 'rational' - this means their rationality is easily comprehensible - others are 'rational' only in terms of the specific social relations in particular fields and of the 'hidden transcripts' of power and counter-hegemony beneath the surface of public discourse (Scott, 1990). These concerns often can only be known with a profound insight into the structure of the given field and of the specific points of view open to the various players in that field. Bourdieu is right in advancing the point that the rationality of decisions cannot be approached in an abstract manner, but must be assessed in the context of the 'field' concerned and of the *habitus* characteristic for social actors in that field. In that perspective it makes sense to note also the pragmatic nature of strategies, as Hodkinson & Sparkes do for decision-making processes in career

development (1997, 33). They speak of "pragmatically rational decision-making". The rational aspects of decisions depend on the viewpoints ("horizons for action") of the actor, including the position in the 'field' and its *habitus*. In this context, people make 'pragmatically rational' decisions.

(ad 2) What is the target of 'pragmatic rationality' in educational strategies? In analysing our biographical data it seemed sensible to approach participation strategies as a kind of 'education-as-investment' strategy. Primary actors see education as a particular kind of investment from which they expect certain benefits. Improving life chances in general is a return that people clearly expect from investing in education. Obviously, this reasoning refers to the human capital theory, which is not very popular in adult education research literature. A great deal of recent criticism of human capital theory in adult education literature is convincing (see, e.g. Schuller & Field, 1998), but the basic notion that adult education can be considered as a capital-investment strategy remains valid. Many decisions of social actors about adult education participation can be interpreted as pragmatic-rational strategic decisions designed to maximize one's value in various future markets, in order to reproduce or to improve one's relative position in social hierarchies.

A way of overcoming the often not very productive debate on human capital theory is to broaden the notion of capital to include various kinds of capital, as Bourdieu does. Adult education participation thus can be seen not only as an investment in economically valuable assets such as knowledge and skills valuable to the labour market, but also as an investment in the social, cultural or symbolic capital of an individual, a family or a local community. More precisely, we can define education as an investment in educational capital, defined in the broad sense as mentioned above, which can be mobilized for various 'markets' such as the labour market, the power field, the domain where social or symbolic capital is exchanged, etc. Knowledge, skills, attitudes, credentials and titles can be rewarded not only in the economic sense, on the labour market, but also - as Bourdieu has shown - on the markets of social, cultural and symbolic capital. For the educated person there is no distinction possible between economic, social, cultural or symbolic capital; the learned knowledge, skills and attitudes may not be economically measurable in themselves, but can be mobilized in various ways on the different markets. Research shows that there have been many potentially beneficial outcomes of education, so it is plausible to assume that actors can have various beneficial outcomes in mind when taking strategic decisions concerning educational participation. The aggregate returns from these

decisions also can be very distinct from, and subjectively more important than, those expressed solely in monetary terms.

The other side of the coin of approaching social actors as those who pragmatically or rationally take educational investment decisions, is that the 'rationality' of decision-making processes of non-participants must also be seen as a more or less rational assessment of costs and benefits (where the expected benefits do not outweigh the perceived direct and opportunity costs). If the benefits of education are to be seen as being more than purely economic, then the same also applies to costs. In this context, the analysis, and evaluation of the implications, of 'barriers to participation' can be very useful. Many of the so-called psychological barriers then can be seen as referring to powerful socio-cultural views that all see education as being not very relevant or helpful in the life strategies of that particular social unit. Moreover, these views must be related to specific standpoints and 'horizons for action' in the field and the social relations concerned. They may be less rational for actors with different horizons, but are to be seen as 'rational' in the framework of the subjects themselves. The body of literature on 'resistance to education' in the sociology of education can be very helpful in this respect. The renowned study of Paul Willis (1977), for example, explained the counter-hegemonic actions and the resistance of the 'lads' to the school culture and the messages in its

official rhetoric from the internal logic of their male working-class culture. The fact that the outcomes of their strategic behaviour implied a reproduction of subordination, which meant that in terms of the society at large their resistance proved to be counterproductive, does not refute the basic point that they behaved rationally within their own cultural terms.

At this point the question arises of how accurate the images of social actors, (non)participants for example, are about the potentially beneficial outcomes of education. We can profit here from some insights of human capital theory itself. As Craig (1981) has pointed out, it is nearly impossible for investors to predict precisely the return from a particular form or level of education. Future developments in the various markets where educational assets and credentials can be invested are very unpredictable. This makes planning very complicated, although not meaningless. Even the anticipation of reaching some form or level of education, or of the probability that specific education will result in the desired outcome, is a very risky matter. Taking this into account, one is astonished by the relative accuracy with which respondents produce images of potentially beneficial outcomes of educational participation in interviews. People construct these images on the basis of culturally embedded collective experiences and memories. Because of their deep roots in collective memory and cultural heritage of a social category, these

images can be very powerful. Moreover, this constitutes the *habitus* within which educational strategies are fabricated.

Because planning and prediction are so difficult in education, educational investment strategies can be heavily influenced by all kinds of cultural or ideological messages 'from above', which try to counteract the culturally embedded images of subordinate social groups. Especially in the field of adult education, where clear statements about the links between certain forms of education and their specific 'value' or outcomes are even more difficult than in other levels of education, ideological discourses on the importance of investing in learning can be very important. This is the case, even though their effective power depends on the responsiveness of various social groups. Contemporary messages and discourses on 'lifelong learning' and the 'knowledge society' may seem relevant and plausible from a particular perspective, but they risk having no other strength other than the perspective of their own ideological hegemony.

The accuracy of images about the potentially beneficial outcomes of education seems to vary among different social groups. Those in relatively favoured positions appear to have more complete and accurate information about the return on educational investment. Moreover, the more the benefits of education are known, the more likely these benefits are valued. (Craig, 1981). It is precisely

educational attainment that appears to correlate with an accurate appreciation of the potential beneficial effects of investing more in education. This could partly explain one of the constant findings in participation research that participation corresponds with educational attainment. The question remains whether the higher accuracy in forecasting the return on educational investment among more educated strata is to be explained by specific cognitive skills obtained in previous education, or by a cultural process of socialization into an appreciation of the value of education, which happens to correspond with reality. The reverse applies to lower strata. Is their lower valuation of the potential benefits resulting from educational investment based upon less adequate cognitive skills in foreseeing and planning the future, or upon cumulative real experiences accumulated in collective memory, which devalue the official rhetoric? In either case, we encounter here another element relating to the competence of strategic learning.

(ad 3) Since in most cases education is an individual business, individuals take educational participation decisions and therefore seem to be the agents of educational strategies. However, it is more plausible to situate educational strategies in the context of the family. As family historians have shown in their use of the concept of 'family strategies', the frame of reference for strategies, and the social site

where they are meaningful, is the family. First of all this pertains to the economic role of the family, for which the term 'household' is appropriate. The family economy is the context in which decisions are taken and strategies developed concerning labour supply behaviour, the pooling of income, the spread of socio-economic risks, etc. (Smith & Wallerstein, 1992). The striving for long-term autonomy, for survival in times of distress, for security, and for its future reproduction guides these decision-making processes. In a perspective on education-as-investment we must therefore place the development of educational strategies first of all in the context of the family economy (Tilly, 1979). Of course, here again we need a rather comprehensive definition of the term 'economy'. Family strategies also comprise social strategies such as investing in social capital, extending networks, changing role patterns, etc. The same could probably be said about the cultural and socialization functions of the family.

Examples of family strategies are abundant in contemporary sociological research (e.g. Cohen, 1992; Edin & Lein, 1997; Pratt & Hanson, 1991; Laaroussi, 1994). This research indicates also that the concept of family strategy is not without its conceptual difficulties (Moen & Wethington, 1992). Certainly, one is the temptation to neglect the significance of different, internal power relations within the family. Feminist-inspired research, in particular, has shed light on

the crucial roles of women in survival strategies, even under patriarchal relations. Also important is the structure of power relations between generations in families. This is particularly relevant for educational strategies, since parents take important initial decisions on the schooling of children; this can have powerful long-term effects. Children must develop their own educational strategies with reference to the strategies their parents have already initiated. Educational strategies of younger generations can be seen as related cumulatively to those the older generations have initiated, or on the contrary as compensatory or corrective to them. Extrapolating this observation we must point at the multi-generational aspects of educational strategies. Educational strategies and their underlying frames of reference and social logic are passed from one generation to another. Relatively strong and resolute life-choices, often in the context of expanding or narrowing opportunities associated with upward or downward social mobility and changing corresponding 'horizons for action', are needed to divert people from these inherited strategies.

(ad 4) Another important question in this respect refers to the stability of educational strategies. Strategic behaviour by definition is relatively constant over time since strategies are meant to result in long-term reproduction effects. This particularly applies to

educational strategies because the potential benefits of education are to be situated in a rather distant future, even in adult education. Therefore when introducing the concept of educational strategies, we point to the relatively stable 'pragmatic-rational' investment logic that defines the frame for particular educational decision-making processes. However, this apparently contradicts with the observation that family strategies vary across crucial periods in the family life cycle. Family strategies feature particular patterns as families move through their life cycle (Robinson, 1993). Families adapt their strategies to changing situations and new challenges especially in times of distress or impoverishment. This is also valid for educational strategies. Educational strategies are continuously being developed and transformed by confronting outcomes and effects of learning with investment expectations, by the impact of 'significant learning experiences' (Antikainen et.al., 1996) on one's identity and life course, by the confrontation of decisive ruptures, 'biographical discontinuities' (Alheit, 1994b) or 'turning-points', or by the influence of 'significant others' within one's life-world.

We must locate the evolution (and the balance between continuity and change) of educational strategies in the biographies and life-cycle patterns of individuals and families. Of course, the well-established biographical research perspective in adult education can be very helpful in this regard (Bron-Wojciechowska, 1993; Alheit,

1994, 1997; Antikainen, 1998). In addition, the relationship between life-cycle and adult education participation has been established (Courtney, 1992; Yang, 1998). The transition to adulthood and the school-work transition are especially well documented (Pallas, 1993). In these and other studies we can detect numerous indications that refer to lifelong patterns or 'strategies' of education. The inspiring research of Antikainen et.al. (1996), for example, while not using the notion of 'educational strategies', hints at the role of education in the making of the life course. However, by focussing particularly on significant learning experiences in this research, the educational biographies are understood mainly through their internal logic. Instead, the concept of educational strategy refers more to the imbeddedness in social, economic and cultural investment logic of families producing those strategies.

An important question in this respect is where the balance is to be situated between structural biographical conditions or 'institutionalized life-course patterns' (Alheit, 1997, 13) and the freedom to make autonomously deliberate, intentional, conscious decisions concerning our own life course. As we have suggested when discussing Bourdieu's use of the concept of strategy, to a large extent this is a false question since both are mutually compatible, while operating at the same time. Alheit states that "it therefore seems plausible that the basic feeling of autonomy is not in fact an

action scheme of any kind, or a conscious and intentional biographical plan, but a kind of hidden meaning behind the changing processual structures of our life course" (ibid., 17f). This is a description very close to the notion of the strategy-generating *habitus* of Bourdieu.

The concept of 'reflexive biographies', introduced by Beck (1994) and Giddens (1991), seems fundamental in this respect. The de-traditionalization and de-standardization of biographies in contemporary (late modern) society forces subjects to develop more reflexivity concerning life-course decisions. Giddens refers to a comprehensive process of 'institutionalization of reflexivity', which takes place as the application of knowledge to all aspects of social life becomes the characteristic process of late modern society (Hake, 1998). Decisions regarding one's own life course must be made more reflexible and various resources and skills must be mobilized in this process. 'Biographical skills' become important tools and are thus also learning targets; this is an important new functionality of adult education. One could even argue with Alheit and Antikainen (1996) that 'biographical competence' becomes the key competence in our age. "Whether in institutional or informal settings, intentional learning can become a biographical resource for individuals in the strategic planning of individual life courses", according to Hake (1998).

Educational strategies are obviously an important dimension of these reflexive biographies. These insights substantiate the already-mentioned point that there is an historical tendency - associated with modernization - of increasing strategic behaviour and competence. Since education has such a crucial role in the making of biographies and because of the 'meta-function' of education in developing biographical competence, it could be argued that educational strategies are the most important components in the construction of biographies.

Strategic learning as competence

Let us now turn to the topic of strategic learning as a (key) competence in late modern society. The point here is that in the field of 'biographical competencies', the ability to think strategically about education and learning in the making of the biography of one's self and one's family is crucial. Educational strategies, rooted in the *habitus* of a given social and cultural (and educational) field, need not be conscious, coherent or well-defined constructs. It is their socially situated pragmatic-rational logic and not their consciousness or internal coherence that is to be held responsible for their intrinsic power and their impact on actual educational decision-making processes. However, one can argue that in the context of increasingly necessary biographical reflexivity, social actors can benefit from making educational strategies more explicit, coherent and accurate. In this sense, learning to act strategically in education and learning can become an important biographical 'developmental task'. Not being able to develop a comprehensive strategic approach towards learning as a crucial tool in the making of one's own biography can seriously hinder the survival potential of individuals and families in this learning society, where competition in various markets depends precisely on the mobilization of specific educational assets.

What elements constitute this competence? We have already indicated a number of them. First of all, strategic learning as a key competence presupposes a notion of self-control and identity. In order to learn to act strategically one must develop a sense of unity and identity. This provides also an internal *'locus* of control' and a developed sense of capability to influence and to control time and space environments. Social actors who are not able to demarcate themselves from the environment, to consider themselves as a unity, or to think of themselves as capable of acting upon their environments, cannot be regarded as capable of developing much strategic behaviour. Developing powerful and effective educational strategies is conditional on the ability to formulate authentic long-term answers to various biographical challenges on matters of education, schooling and lifelong learning. We have seen that this capacity presupposes the internal force to conquer autonomous spaces against existing power relations. This means also that external pressures must be converted into genuine personal reactions. These external pressures can come from above, in the form either of direct 'learning pressures' or of more ideological messages confirming the desirability of education and learning. They can also be generated from deep rooted traditions and experiences of the social environment (class, gender, ethnicity), which define a specific, socially situated *habitus* regarding education and learning.

Converting these external pressures into internal strategic choices thus means critically testing their relevance and suitability to one's own living conditions, and the reliability of their intrinsic promises. After this critical investigation, which sometimes involves some cognitive and emotional process of de-traditionalization, one can decide whether these external pressures can be accommodated adequately in one's own strategic behaviour.

Secondly, strategic learning competence also includes the ability to generate accurate and adequate planning skills. Planning, in fact, is but a further consequence of the more general idea of control of temporal environments. We have seen that educational planning, which is central to the concept of educational strategies, is a rather problematic activity for primary actors, given the amount of uncertainty associated with the realization of expected or planned outcomes of education. Social actors, therefore, need to develop specific biographical planning skills that can help them explore the probabilities of different outcomes of educational investment decisions in a rather distant future. In this respect, the increasing biographical uncertainties, which result from de-standardization and de-traditionalization, render this planning activity even more complex. One could argue that the 'no-future' attitude of contemporary youngsters is in fact nothing more that a sense of being not capable of saying anything meaningful about the relation

between educational investment and the prospects of a better future life.

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